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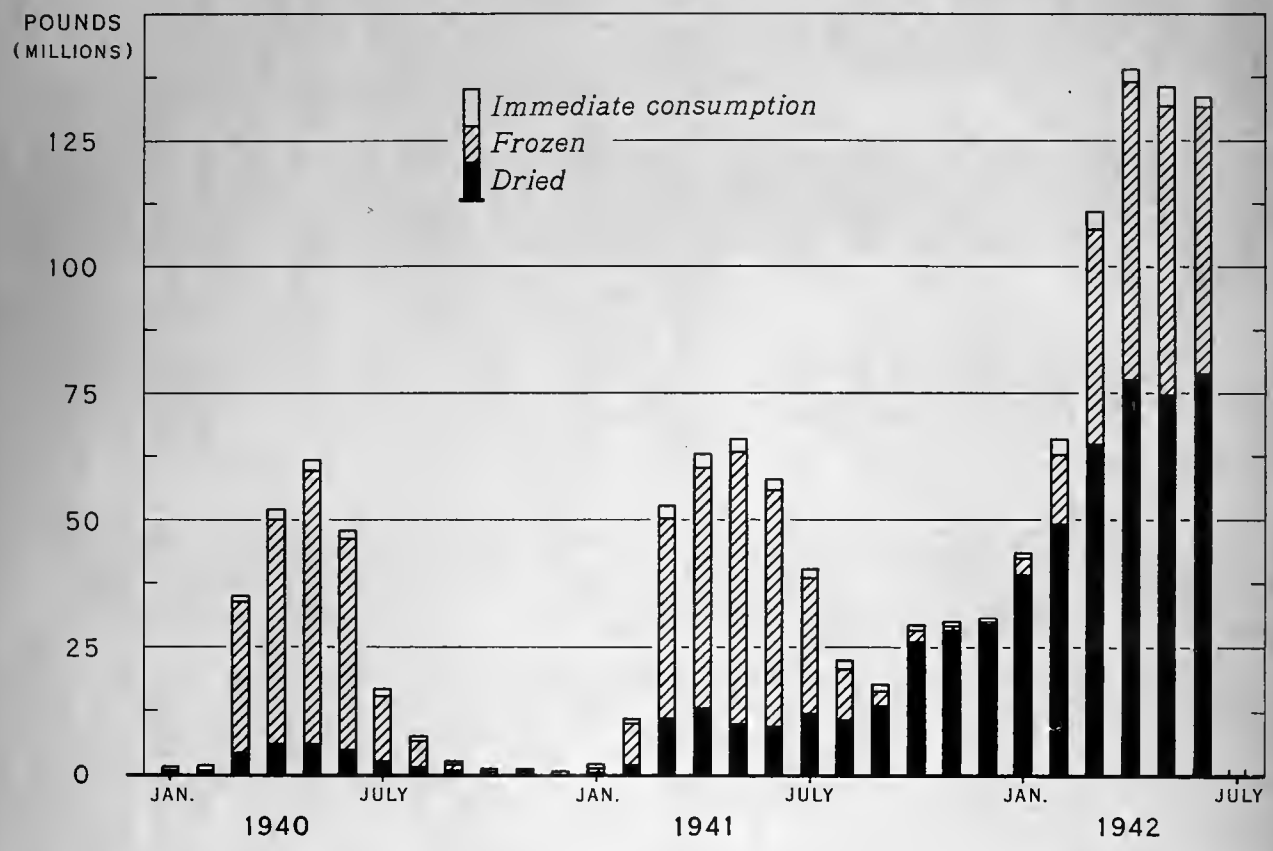
THE Poultry and Egg SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

PES-67 BAE JULY 1942

LIQUID EGG: PRODUCTION AND UTILIZATION, UNITED STATES, 1940-42



U. S. DEPARTMENT OF AGRICULTURE NEG. 42439 BUREAU OF AGRICULTURAL ECONOMICS

PRIOR TO 1941 LIQUID EGG WAS PRODUCED PRIMARILY IN THE SPRING AND EARLY SUMMER. FOLLOWING THE INAUGURATION OF THE LEND-LEASE PROGRAM LAST YEAR, EGG DRYING FACILITIES IN THE UNITED STATES WERE EXPANDED ABOUT SIXFOLD. TO SUPPLY THE NEEDS FOR DRYING PLANTS DURING THE REMAINDER OF THIS YEAR, AS MUCH AS 200 MILLION POUNDS OF LIQUID EGG MAY BE OBTAINED FROM FROZEN AND SHELL EGGS NOW IN STORAGE. A CASE OF SHELL EGGS YIELDS ABOUT 37.5 POUNDS OF LIQUID OR 10 POUNDS OF DRIED WHOLE EGG.

STATISTICAL SUMMARY

ITEM	UNIT	JUNE AVERAGE		1941		1942		PCT. OF YEAR EARLIER
		PERIOD	AVERAGE	MAY	JUNE	MAY	JUNE	
Number of layers on farms	*Million*	1931-40	267	286	271	327	310	114
Number of eggs laid per hen	*Number*	1931-40	14.2	17.4	15.1	17.6	15.2	101
Total farm production of eggs	*Mil. case*	1931-40	10.56	13.79	11.36	16.02	13.14	116
Stocks, eggs:[1]								
Privately owned, shell	*1,000 case*	1931-40	7,719	4,960	6,100	6,908	7,755	127
Privately owned, frozen	*1,000 case*	1931-40	3,363	3,788	4,372	5,785	7,251	166
USDA owned, shell	*1,000 case*	--	--	415	327	37	193	59
USDA owned, frozen	*1,000 case*	--	--	0	391	184	132	34
Total	*1,000 case*	1931-40	11,175	9,163	11,190	12,914	15,330	137
Purchases, eggs, USDA:								
Dried[2]	*Mil. lb.*	--	--	0.8	0.7	27.4	22.2	3,171
Shell, direct	*1,000 case*	--	--	399	38	30	18	47
Shell, blue stamp[3]	*1,000 case*	--	--	179	194	172		96
Liquid egg production[4]	*Mil. lb.*	--	--	66.2	57.9	135.7	133.4	98
Dried egg production	*Mil. lb.*	--	--	2.9	2.9	21.0	21.9	104
Commercial hatchery operations:								
Eggs set	*Million*	--	--	272	126	286	99	79
Chicks hatched	*Million*	--	--	224	131	244	122	93
Receipts:								
Poultry, dressed, four markets	*Mil. lb.*	1931-40	22.6	29.1	27.3	29.0	31.0	114
Poultry, live, Chicago[5]	*Car*	1936-40	418	393	394	363	401	102
Poultry, live, New York[5]	*Car*	1936-40	705	538	546	546		101
Poultry, live, Midwest, per plant	*1,000 lb.*	1932-40	14.6	12.3	13.5	10.8	19.7	146
Fowl, live, Midwest, per plant	*1,000 lb.*	1932-40	10.8	9.0	8.0	7.8	13.9	174
Young stock, live, Midwest-per plant	*1,000 lb.*	1932-40	2.9	--	4.5	--	4.4	98
Stocks, poultry:[1]								
Broilers	*Mil. lb.*	1936-40	5.5	4.3	4.9	3.8	3.6	73
Fryers	*Mil. lb.*	1936-40	2.6	4.3	3.6	2.7	2.1	58
Roasters	*Mil. lb.*	1936-40	6.7	14.1	12.0	8.7	5.1	42
Fowls	*Mil. lb.*	1936-40	12.1	14.9	13.8	14.8	18.1	131
Turkeys	*Mil. lb.*	1936-40	20.1	30.4	28.0	31.4	28.3	101
Ducks	*Mil. lb.*	1936-40	4.8	3.5	6.6	2.6	4.6	70
Miscellaneous and unclassified	*Mil. lb.*	1936-40	12.8	15.9	16.6	16.3	17.5	105
Total poultry	*Mil. lb.*	1936-40	64.7	87.4	85.6	80.2	79.3	93
Prices received by farmers:								
Eggs, per dozen	*Cent*	1931-40	15.3	20.1	23.2	26.5	27.4	118
Eggs, parity price per dozen	*Cent*	1931-40	21.3	22.7	22.4	26.8	25.8	115
Eggs, percentage of parity	*Percent*	1931-40	72	89	104	99	106	--
Chickens, per pound	*Cent*	1931-40	13.8	16.2	16.3	18.4	18.5	113
Chickens, parity price per pound	*Cent*	1931-40	14.6	14.8	15.0	17.3	17.3	115
Chickens, percentage of parity	*Percent*	1931-40	94	110	109	106	106	--
Turkeys, per pound	*Cent*	1936-40	14.5	15.4	15.4	19.1	18.6	121
Turkeys, parity price per pound[6]	*Cent*	1936-40	18.6	18.7	19.0	21.9	21.9	115
All farm commodities, (1910-14 = 100)	*Index no.*	1931-40	91	112	118	152	151	128
Chickens and eggs, (1910-14 = 100)	*Index no.*	1931-40	85	107	118	134	137	116
Wholesale prices, Chicago:								
Eggs, fresh firsts per dozen	*Cent*	1931-40	16.8	22.3	25.4	30.1	30.4	120
Live heavy hens per pound	*Cent*	1936-40	16.3	18.7	19.0	20.6	19.2	101
Live broilers, B. R., per pound	*Cent*	1936-40	19.7	19.6	18.8	25.7	25.2	134
Live roasters, light, W. R., per pound	*Cent*	--	--	19.3	18.2	27.1	25.9	142
Live roasters, heavy, W. R., per pound	*Cent*	--	--	21.5	20.9	29.1	29.4	141
Cash farm income:[7]								
Total marketings	*Mil. dol.*	1936-40	577	747	773	993		133
Poultry and eggs	*Mil. dol.*	1936-40	66	83	86	136		164
Price ratios:								
Chicago, Broiler, B. R., - feed	*Lb. feed*	1936-40	15.8	14.3	13.5	14.8	14.8	110
Chicago, Light Roasters, W. R., - feed	*Lb. feed*	1936-40	18.8	14.1	13.0	15.6	15.3	118
Farm, egg - feed	*Lb. feed*	1931-40	13.5	15.6	17.5	15.7	16.4	94
Farm, chicken-feed	*Lb. feed*	1931-40	12.5	12.6	12.3	10.9	11.1	90
Farm, turkey-feed	*Lb. feed*	1936-40	11.8	11.9	11.6	11.3	11.1	96
Feed cost per cwt., farm poultry ration	*Dollar*	1931-40	1.17	1.29	1.33	1.69	1.67	126
Wholesale food prices (1935-39 = 100)	*Index no.*	1931-40	91.2	100.5	105.1	125.0	125.5	100
Retail food prices (1935-39 = 100)	*Index no.*	1931-40	96.1	102.1	105.9	121.6	123.2	101
Prices paid by farmers including interest and taxes (1910-14 = 100)	*Index no.*	1931-40	128	130	132	152	152	115
Retail prices (BLS):								
Roasters, dressed, per pound	*Cent*	1931-40	30.5	33.9	33.8	36.1		106
Eggs, strictly fresh, per dozen	*Cent*	1931-40	28.5	33.3	36.9	40.9		123
Nonagricultural employees' compensation (1924-29 = 100)	*Index no.*	1931-40	84.8	126.7	130.6	155.2		122

[1] End of month. Frozen eggs converted to case equivalent.

[2] Includes purchases for future delivery.

[3] Adjusted for wastage in distribution.

[4] Includes production by egg-drying plants as well as by strictly commercial egg-breaking plants.

[5] Car equivalent of receipts by freight, truck and express.

[6] Percentages of parity for turkeys not shown because sales in May and June usually account for less than 5 percent of annual sales.

[7] Figures for 1941 and 1942 are not strictly comparable; figures for poultry and eggs for 1942 are based on revised production data and include broilers.

THE POULTRY AND EGG SITUATION

Summary

Farm marketings of chickens are likely to continue larger than a year earlier and will increase considerably until the usual seasonal peak is reached in October or November. In recent weeks marketings of fowl in the Midwest have been much larger than last year, although sales of young stock have been about the same. Farmers may be taking advantage of more favorable chicken prices by feeding birds to heavier weights. Storage stocks of poultry are about at the seasonal low, with stocks of fowl the largest on record for this date and stocks of young chickens the smallest since 1924.

The effects on prices of the larger marketings of chickens this year are likely to be slightly more than offset by stronger consumer and storage demand. Prices of some classes, particularly heavy roasters, may be little different from a year earlier, however, during the period of peak marketings. In mid-June the average price received by farmers for chickens in the United States was 13 percent higher than a year earlier and wholesale prices for both live and dressed birds have continued higher than last year. Turkey prices also have continued higher this year than last.

The demand for baby chicks for commercial broilers has strengthened in response to the recent advance in prices of young chickens. On July 1, advance orders for chicks in broiler areas were considerably larger than on July 1 last year.

Egg production in June, as in the first half of the year, was 16 percent larger than a year earlier. Numbers of layers on farms declined from May to June by about the same percentage as in 1941, even though marketings

of fowl in June were heavy. The proportionate decline during the first half of the year, however, was somewhat smaller than last year. In June the number of layers was 14 percent larger than a year earlier and about 1 percent more eggs were produced per bird. The egg-feed price ratio in June was slightly less favorable than last year but considerably more favorable than average. Wholesale prices of fresh firsts at Chicago in mid-July were somewhat higher than in mid-June and were about 23 percent higher than a year ago.

-- July 18, 1942

REVIEW OF RECENT DEVELOPMENTS

January-June Egg Production 16 Percent Over a Year Earlier

The decline in numbers of layers in the United States from May to June this year was about the same as in 1941. The 14.5 percent increase over a year earlier which existed in May was maintained into June, but changes in regions were varied. In the East North Central and Western States, numbers declined relative to a year earlier. In the West North Central and South Atlantic States numbers increased. In the North Atlantic and South Central regions the increases over 1941 in June were the same as in May.

With a little over 1 percent more eggs laid per bird, total June egg production was nearly 16 percent larger than last year, similar to increases over 1941 for the first 6 months of 1942. Increases in egg production by regions over the output in the first 6 months of 1941 were as follows: North Atlantic, 8 percent; East North Central, 12 percent; West North Central, 24 percent; South Atlantic, 16 percent; South Central, 20 percent; and Western, 9 percent.

Nearly 17 Million Cases of Shell Eggs Used by Breaking and Drying Plants in First Half of 1942

In June about 133.4 million pounds of liquid eggs were produced by commercial egg breaking and drying plants in the United States. Of this amount about 1.8 million pounds were used for immediate consumption and 52.8 million pounds were frozen. From the remainder, about 21.9 million pounds of dried product, mostly whole eggs, were obtained.

The rapid growth of the egg breaking and drying industries in the United States is portrayed in the chart on the cover page. In the first half of this year about 630 million pounds of liquid egg were produced by egg breaking and drying plants. Of this total quantity about 228 million

pounds were frozen and 286 million pounds were used for drying. A total of 108 million pounds of dried-egg were produced during that period. In the first half of 1941, 253 million pounds of liquid were obtained and 13 million pounds of dried-egg were produced.

Since a case of shell eggs yeilds about 37.5 pounds of liquid product, about 17 million cases of eggs probably were used by egg breaking and drying plants in the first half of 1942. In addition, considerable quantities were used by firms which break eggs for use in manufactured products. Such quantities are not included in the regular egg-breaking and egg-drying figures.

Department of Agriculture Purchases

In late June it was announced that the Department of Agriculture would continue to receive offers for the sale of dried eggs after June 30 and until further notice. On the first two purchase days in July (through July 11) 6.7 million pounds of dried eggs were purchased, raising the total quantity deliverable during the last half of 1942 to about 90 million pounds. Purchases by the Department of Agriculture for lend-lease and by the Army and Navy now take most of the output of dried eggs.

It was also announced in late June that the Department would continue to purchase shell eggs in lots of 10 cases or more in the States of West Virginia, Georgia, South Carolina and Florida. Purchase programs for shell eggs in all other States ended on June 30. New announcements will be made when additional offers for the sale of shell eggs are desired.

Into-storage Movement of Frozen Eggs in June Larger a Year Earlier; Shell Eggs Smaller

The net into-storage movement of frozen eggs in June was by far the largest on record and holdings on July 1 were 55 percent, or 2.6 million cases, more than on July 1 last year. The equivalent of 1.9 million cases was indicated to have been ear-marked for drying later in the year.

Although the into-storage movement of shell eggs in June was the smallest since 1932, total net accumulations up to July 1 were relatively large and stocks on that date were 24 percent, or about 1.5 million cases, larger than on July 1 last year. Of the 7,948,000 cases of shell eggs in storage on July 1, about 3,265,000 cases were indicated to have been ear-marked for drying. Holdings of shell eggs by the Department of Agriculture increased about 150,000 cases during June but were considerably smaller than on July 1 of either of the 2 previous years.

Egg Prices Advanced Somewhat From Mid-June to Mid-July

Receipts of eggs at terminal markets have been declining for several weeks and egg prices have advanced somewhat. The price of fresh firsts in carlots at Chicago in mid-July was 32-1/4 cents compared with 30-3/4 cents a month earlier and about 26 cents a year earlier. Prices received by

farmers for eggs in the central part of the country continue high relative to the average for the entire country. In mid-June prices in all regions were well above the support level of 85 percent of parity.

Fowl Marketings Larger Than a Year Ago;
Receipts of Young Stock About the Same

Although numbers of layers decreased in about the same proportion as a year ago from May to June, receipts of fowl at Midwest primary markets in June were materially larger. In some recent weeks receipts of fowl at Midwest primary markets have been the largest on record. Large numbers can be marketed this summer with a less than seasonal decline in total numbers on farms.

Despite the large increase in numbers of young chickens raised this year, especially early season chicks, receipts of young stocks at Midwest primary markets have been little different from a year ago. Apparently farmers are responding to more favorable chicken prices by feeding their birds to heavier weights, thus delaying marketings somewhat. In the South, marketings of young chickens begin much earlier than in other regions and numbers of young birds decreased somewhat during June, as in all past years of record. In all other regions numbers increased during that month.

Storage Holdings of Poultry
About at Seasonal Low Point

Net withdrawals of frozen poultry this June were smaller than last, largely because of the larger into-storage movement of fowl. Although marketings of young chickens have been about as large as a year ago, net withdrawals of these birds were about twice those of June last year. Holdings of fowl on July 1 were the largest on record but stocks of young chickens were about half as large as a year earlier and the smallest since 1924.

Prices During Past Month: Fowl Prices Steady;
Light Chickens Advanced; Heavy Chickens Down

Despite the heavy marketings of fowl, wholesale prices of live hens at Chicago advanced slightly from mid-June to mid-July and were about the same as in July last year. Prices of dressed fowl at New York were slightly higher than in mid-July 1941.

Wholesale prices of light young chickens (live) at Chicago continued much higher than a year earlier. Heavy young chickens (4 pounds and over) at that market declined slightly but continued 20 to 25 percent higher than last year. Wholesale prices of ice-packed chickens at New York advanced further during the past few weeks and are materially higher than a year ago. Prices of box-packed chickens were steady. At San Francisco prices of live hens declined moderately but prices of young chickens advanced from early June to the first part of July.

Some Canned Poultry and Egg Products Subject to Maximum Price Regulation

In late June the Office of Price Administration announced the interpretation of the meaning of "eggs and poultry" which will be used in administering General Maximum Price Regulation. It was stated that "the following canned products are not deemed to be 'eggs and poultry', within the meaning of the General Maximum Price Regulation, and accordingly, are subject to the maximum prices established by the Regulation: canned dried egg products, canned boned chicken, turkey, etc.; canned whole chicken, turkey, etc.; potted chicken, turkey, etc.; chicken a la king; chicken bouillon cubes; chicken and egg noodle; chicken paste or spread; chicken and noodle soup; chicken soup; chicken broth soup; dried chicken broth; chicken gumbo soup, and country style chicken soup." In an ensuing statement, canned dried egg products packed for the United States Government, or any Agency thereof, were excluded from those products subject to the Regulation. All other forms of eggs and poultry and products made in substantial part therefrom, are exempt from control under the Regulation. It was pointed out in the O.P.A. announcement that the exemption of "eggs and poultry" from price control does not relate solely to "unprocessed eggs and poultry" but also applies to "processed eggs and slaughtered poultry". It was stated further, however, that when processing or manufacturing went as far as canning, the exemption would not apply.

Cash farm income from poultry used in canning constitutes a relatively small proportion of total annual cash income from poultry. Prices received by farmers for chickens, eggs, and turkeys are below the minimum levels at which ceilings can be established under the Emergency Price Control Act.

OUTLOOK

BACKGROUND.- On the average the number of layers on farms in the United States is reduced by about one-fourth from January the seasonal high-point, to August the seasonal low-point. This reduction results from culling of layers and from death losses. Variations from the average reductions are determined to a considerable extent by the relative favorableness of the relationship between egg prices and feed prices. This relationship has been favorable to producers since April of 1941 and farmers have culled flocks relatively lightly. Since January, numbers on farms have declined proportionately less than a year earlier, and the net reduction from January to August this year may be about one-fifth. Heavy sales of hens are made after August but the number of layers increases as pullets are added.

Egg Production Likely to Continue Much Larger Than a Year Earlier

Although the rate of increase in egg output may not continue at the same rate as in the first half of 1942, production will continue considerably larger than a year earlier. In coming months the increase over 1941

will be due almost entirely to the larger number of layers, since the egg-feed price relationship may continue a little less favorable. In the last two or three months of the year, weather will be an important factor influencing the rate of lay. Unusually mild weather prevailed all last fall and winter. The increase in numbers of layers after August this year may not be as abrupt as in 1941, since the increase in chickens raised will not be as large as last year.

The increased egg production in prospect will be sufficient to permit some increase in domestic consumption, even while supplying large quantities of dried eggs for lend-lease shipment. Egg prices, however, are likely to continue higher because of the much stronger consumer demand this year than last.

Farm Marketings of Chickens to Increase;
Demand for Commercial Broiler Chicks has Strengthened

Marketings of young stock will continue to increase seasonally for the next three or four months, and during much of this period market receipts probably will be larger than a year earlier. Marketings of fowl probably will also continue heavier and will be in heaviest volume in October and November. Supplies of chickens for consumption this fall and winter will be by far, the largest on record, since the large farm output will be supplemented by a record output of commercial broilers. The course of production of these birds in coming months is indicated by the relative volume of advance orders for baby chicks as of July 1. On that date, changes in advance orders, by regions, from a year earlier were as follows: New England, 25 percent; Middle Atlantic, 10 percent; South Atlantic, 28 percent; East North Central, -17 percent; West North Central, -21 percent; South Central, -38 percent; Mountain, -30 percent, and Pacific Coast States, 5 percent. Chicks produced by commercial hatcheries in the last half of the year are used largely for producing commercial broilers.

The effects on prices of the larger supplies of chicken are likely to be more than offset by the stronger consumer and storage demand. Prices of chicken in recent months have been low relative to prices of important cuts of other meats.

North Atlantic States

During the first half of 1942 the number of layers on farms in the North Atlantic States declined about the same proportionately as a year earlier. Numbers on farms were 7.6 percent larger this June than last. The average rate of lay per bird in this region, however, was only slightly higher than a year ago. Egg prices in mid-June were about 4 cents higher this year than last, but feed prices also were higher, and the egg-feed price ratio was a little less favorable, although more favorable than average.

Eggs from the North Atlantic States continue to constitute a larger than usual proportion of receipts in Eastern markets. At Boston, for example, total receipts in June were about as large as in June last year, but the quantity

originating in nearby areas was about twice as great, and the volume from the North Central States was reduced by half. The general pattern of these relationships is likely to continue since production in this area will continue large and egg drying operations are concentrated largely in surplus producing areas. The indirect effects of purchase programs for dried eggs in other areas, of course, will continue to be a price supporting factor in the Northeast.

The number of chicks hatched in this area during June was 16 percent larger than a year ago, but advance orders on July 1, reflecting the improved demand for broiler chicks, were considerably larger than last year.

North Central States

The decline in numbers of layers in the Midwest was less during the first half of this year than last, and considerably less than average. Egg prices in the North Central States have been supported directly by the dried egg program, feed supplies have been large, and the egg-feed price ratio has been relatively more favorable than the average for the entire country. The relatively favorable price situation has encouraged continued high rates of lay, as well as lighter culling, and egg production in this area continues to show larger increases over a year earlier than in other areas.

The number of chicks hatched in this area was 13 percent smaller this June than last, but total numbers raised on farms this year will be materially larger than in 1941. During the first half of this year 12 percent more chicks were hatched than a year earlier and on July 1, the average number of young birds per farm flock in the North Central States was about 7 percent larger.

South Atlantic States

From January to June in the South Atlantic States, numbers of layers declined considerably less this year than last. Although egg prices were relatively low in some localities in the heaviest season of production, the egg-feed ratio in general, was almost as favorable for egg production as last year. The rate of lay in June was slightly higher than in June 1941. In recent weeks egg prices in this area have advanced along with prices in other regions. Relatively few eggs have been purchased by the Department of Agriculture under the small-lot purchase program as extended through August for the States of Virginia, West Virginia, North Carolina, South Carolina, Georgia, Arkansas, and Florida.

During the first half of this year about 10 percent more chicks were produced in the South Atlantic States than in the corresponding 6 months of 1941. On July 1, the average number of young chickens in farm flocks was 6 percent larger than on July 1 last year. Broiler production has been increasing considerably in this area in recent years, and a further material increase apparently will take place in coming months. As on July 1, orders for baby chicks for future delivery were 28 percent larger than on July 1, 1941.

South Central States

During the January-June period this year, numbers of layers on farms in the South Central States declined less than a year earlier, and considerably less than average. In June, 20 percent more layers were on farms than in June 1941, whereas in January the increase was only about 15 percent. The average rate of lay per bird was about the same as in June last year.

The South Central region is the only group of States for which the average number of young chickens per flock declined from June 1 to July 1. This is a usual occurence for this region, since the average hatching date is earlier, and birds are marketed at somewhat lighter weights than in most other states. The decline during June this year was smaller than usual and on July 1, the average number of birds per flock was 13 percent larger than a year ago--the largest increase shown for any region. Advance orders for baby chicks in this area on July 1 were 38 percent smaller than a year earlier.

Western States

Numbers of layers usually decline less in the Western States during the first half of the year than in any other region. The decline in the period January-June this year was even less than in 1941. In June, 9 percent more layers were on farms than in June last year, whereas in January the increase was only 6 percent. This is the only region in which the egg-feed ratio in June was more favorable than a year earlier. Supplies of oats and barley in these states are likely to be much larger this year than last, and the reduction in supplies of copra cake and meal and fish meal will be made up in part, at least, by shipment of soybeans to the West for crushing. Egg prices in this area are likely to continue favorable even though shipments to Eastern markets may not be as large as in some recent years.

A strong demand for broiler chicks apparently has developed in response to the advance in prices of chickens in Pacific Coast markets. On July 1, advance orders for baby chicks in this area were 5 percent larger than last year.

FEED SUPPLIES AND PRICES

Although production of the four principal feed grains this year will be almost as large as the near record output of 1941, supplies per animal unit in 1942-43 may be 10 percent smaller than in 1941-42. Numbers of livestock, especially hogs, have increased considerably. Disappeaance of all feed grains is expected to continue heavy in 1942-43 and the corn carry-over October 1, 1943 probably will be near or below the 1928-37 average of 185 million bushels.

Prices of most by-product feeds have advanced during the past month, with the greatest advance in prices of soybean meal. Prices of wheat mill feeds are somewhat below the maximum prices recently established by the Office of Price Administration, but are considerably higher than they were in July, 1941. The average price paid by farmers for laying mash in the United States in mid-June was $2.88, an increase of 26 percent over July last year.

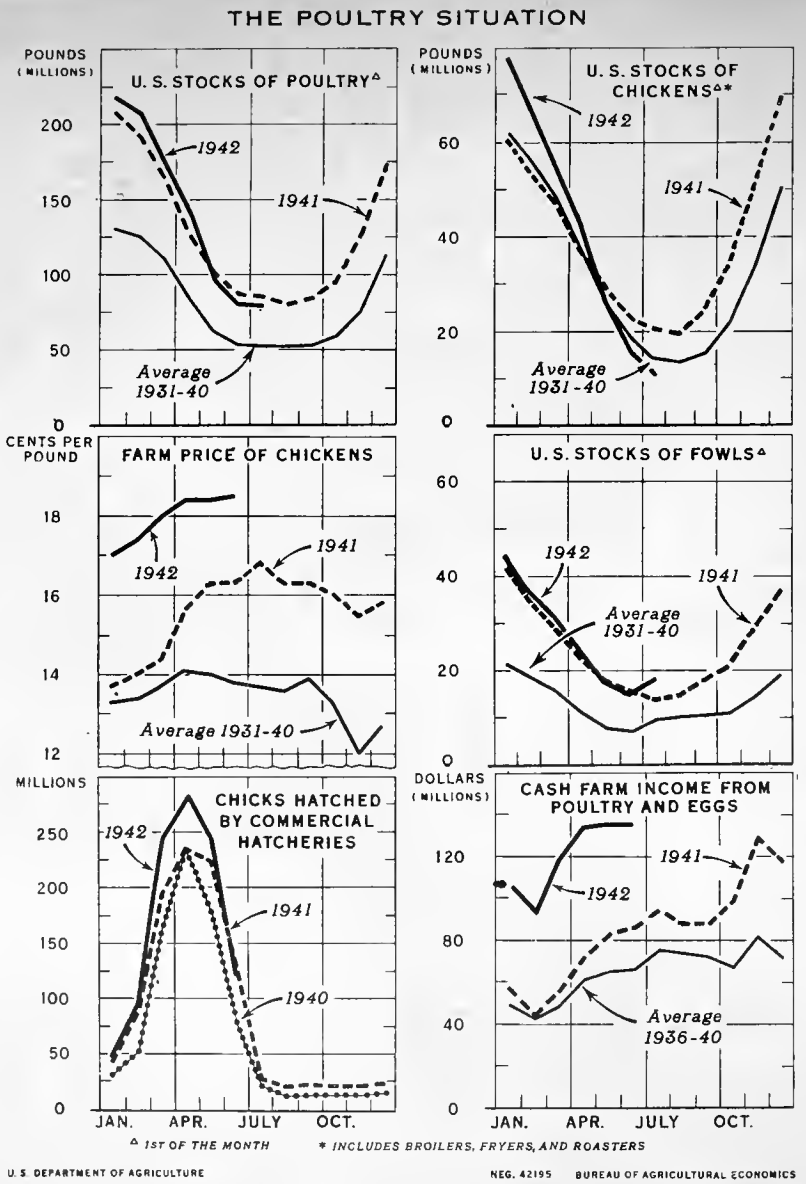


FIGURE 1

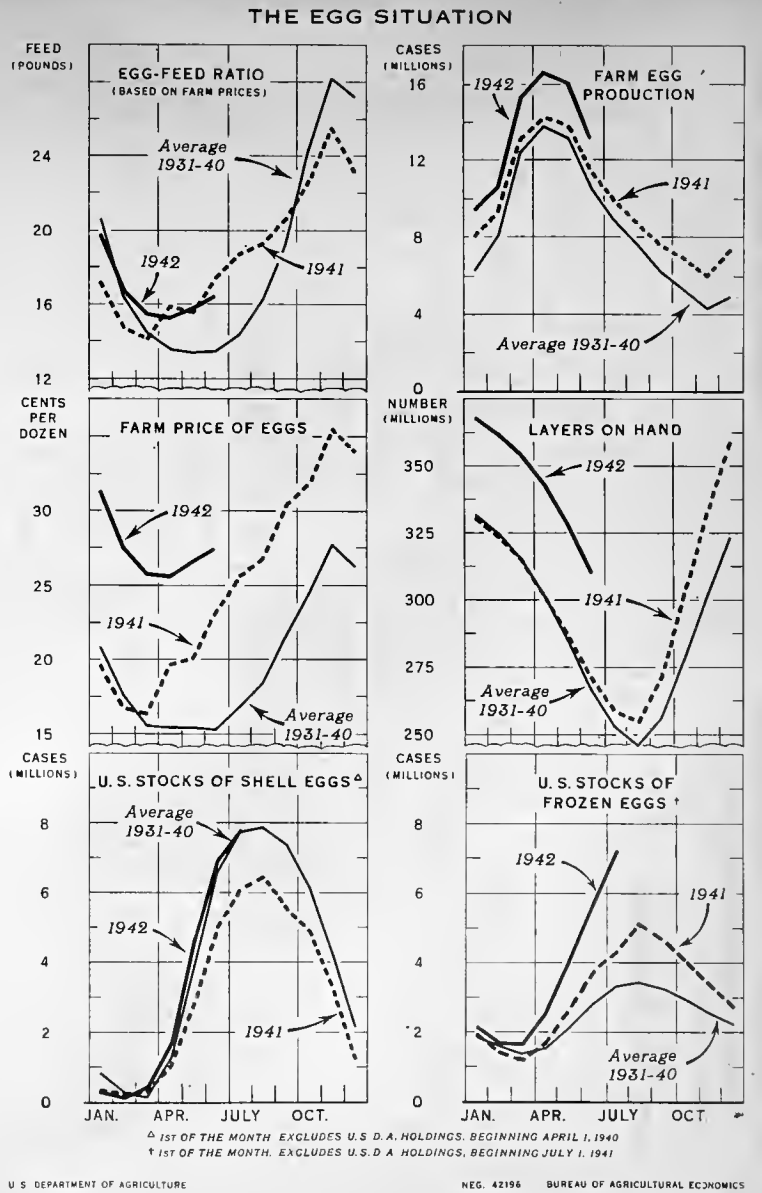


FIGURE 2

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After Five Days Return To
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